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In re Application of:)
Thomas J. Reddin, et al.)
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For: OCCASION BASED MARKETING)

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for filing in the United States Patent and Trademark Office. This application meets the requirements of Rule 53(b) and the inventors are named in full hereinabove. This application is filed under Rule 10, and it is respectfully requested that this application be granted a filing date of **April 21, 1999**, which is the date of deposit in Express Mail.

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Respectfully submitted,
This the **21st** day of **April**

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10 **METHODS AND SYSTEMS FOR OCCASION-BASED
MARKETING**

15

Technical Field

The present invention relates to methods of doing business in the marketing field, and more particularly relates to methods for marketing a product based upon consumers' lifestyles, activities, and needs.

20 **Background of the Invention**

25 The marketing of a product has long focused in part on two prongs or "purchase triggers": (1) availability and (2) price. Particularly in the context of a consumer product, the manufacturer and/or distributor seeks to have that product available to the consumer in as many purchasing environments as possible at a competitive price. For example, The Coca-Cola Company of Atlanta, Georgia, expanded its business throughout the world under the motto of placing the Coca-Cola brands "within an arm's reach of desire." In other words, the Coca-Cola brands were to be available wherever and whenever a consumer may desire a beverage.

30 35 Current competition based on availability and price, however, is fierce for the sale of consumer products such as food

products and beverages. Particularly in the context of the local supermarket or similar environments, competitive advantages based upon shelf space and price are providing ever-decreasing returns. Further, there also are a variety of competing product options and brands in such retail environments. As a result, current profit margins are extremely low for both the manufacturer and/or distributor of the beverages and for the owner/operator of the supermarket or other types of purchasing environments.

What is needed, therefore, are methods and systems for marketing a product without relying exclusively on price. In other words, the product may be promoted and marketed based upon a purchasing trigger that represents activity-based consumer solutions rather than only price. This purchasing trigger may be based upon the vast amounts of consumer marketing and lifestyle data that is routinely collected on modern consumers. There is also a need for methods and systems for marketing a product to distinguish and identify that product in relation to a use of the product.

Summary of the Invention

The present invention provides a method for promoting the selection, sale, or provision of an item to a predetermined type of consumer. The method includes the steps of determining representative activities of the predetermined type of consumer, determining representative uses of the item by the consumer during the representative activities, and creating demand for the item by the consumer based upon one or more of the representative uses of the item by the consumer during the representative activities. These steps may be embodied in a computer-readable medium having computer-executable instructions.

The representative activities may be based upon a predetermined length of time. These activities may be determined by gathering and analyzing consumer lifestyle information. The representative uses of the item may be based upon gathering and analyzing consumer purchase information. Creating demand may

include messaging promoting the item as addressing a need associated with the representative uses or the representative activities.

Specific embodiments include the selection of a home category manager as the predetermined type of consumer. In such a case, the representative activities may include wake up, breakfast, in transit to work, in transit to school, morning break, lunch, afternoon break, after school snack, after school sports, after work workout, dinner, social events, evening snack, and shopping. The item may be a beverage and the representative uses may include refreshment, lift, meal enhancer, socializer, re-hydration, relaxer, treat, and a tide-me-over. Creating demand for the item may then include messaging directed to the home category manager suggesting the use of the beverage as a meal enhancer with dinner. Alternatively, the messaging may suggest the use of the beverage as refreshment during shopping.

In another embodiment, the predetermined type of consumer may include blue-collar adults and teens. The representative activities may include after school, afternoon, and after work. The item may be a beverage and the representative uses may be refreshment, energy, and a tide-me-over. Creating demand for the item may then include messaging directed to the blue-collar adults and teens suggesting the use of the beverage as an energizer during the afternoon.

Creating demand for the item may include the selection of one or more brands of the item. If the item is a liquid or a beverage, the brands may include coffee; tea; water; fruit, vegetable and juice concentrates; fruit, vegetable and juice beverages; isotonic beverages; non-isotonic beverages; milk and milk byproducts; carbonated soft drinks; and soft drink concentrate. The item also may include one or more food brands.

Creating demand for the item also may include selection of packaging. The packaging may include immediate consumption or future consumption packaging. Creating demand for the item may include selection of merchandising. The

merchandising may include bundling the location or the offering of the item with a different item along with messaging promoting the bundling. Creating demand for the item also may include selection of messaging. The messaging may include media advertising; print advertising; radio, television, satellite and cable broadcasting; Internet, e-mail, and computer transmissions; telecommunications; event-based marketing; and direct mail. The messaging also may include in-store and out-doors displays. The messaging may include the name of the item and the representative uses or representative activities.

The present invention may further include the step of determining an environment in which the item is offered. The environment may include a retail environment or a virtual environment. The present invention may further include the step of determining the manner in which the consumer selects the item in the environment. This manner in which the consumer selects the item may be determined by consumer intercept surveys or by transactional data. The manner in which the consumer selects the item may include a quick mission trip, a quick meal solution trip, and a stock-up trip.

A further embodiment of the present invention includes determining the effectiveness of an Occasion-Based Marketing campaign. The invention includes the steps of determining the number of the items selected within the purchasing environment during a first predetermined interval, determining the types of shoppers for the item, determining representative activities of the shoppers, determining representative uses for the item during the representative activities, deploying solutions within the purchasing environment to create demand for the item based upon the representative uses and the representative activities, determining the number of the items selected within the purchasing environment during a second predetermined interval, and determining the difference between the number of the items purchased during the first predetermined interval and the second predetermined interval. Further steps may include determining the average transaction

amount and the average gross profit margin for the item. The invention also may determine the amount of money received based upon the difference between the number of the items purchased during the first predetermined interval and the second predetermined interval, the average transaction amount for the item, and the average gross profit margin for the item.

A further embodiment of the present invention may include a computer-readable medium having stored thereon a data structure. The data structure may include a first data field containing data representing one or more activities of a predetermined type of consumer, a second data field containing data representing one or more uses of an item by the predetermined type of consumer based upon the data representing one or more activities, and a third data field containing data representing one or more marketing solutions for the sale of the item to the predetermined type of consumer based upon the data representing one or more uses of the item.

A further embodiment of the present invention may provide a method for promoting the use of an item by a predetermined type of consumer. The method may include the steps of receiving and storing data corresponding to representative activities of the consumer, receiving and storing data corresponding to representative uses of the item by the consumer, determining a relationship between the data corresponding to the representative activities and the data corresponding to the representative uses of the item, and storing the relationship. The method may further include the steps of creating and storing messaging associating the item with the relationship, receiving and storing data corresponding to the conversion rate of the consumers in response to the messaging, and receiving and storing data corresponding to the average transaction amount and the average gross profit margin for the item. The present invention also may determine the value of the messaging based upon the conversion rate, the average transaction amount for the item, and the average gross profit margin for the item.

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A further embodiment of the present invention may provide a system for facilitating the use of an item by a predetermined type of consumer. The system may include a storage device and a processor connected to the storage device.
5 The storage device may store a program for controlling the processor. The storage device also may store data representing one or more activities of the predetermined type of consumer, data representing one or more needs, and data representing one or more marketing solutions promoting the use of the item by the predetermined type of consumer. The processor also may be
10 operative with the program to receive a request for the marketing solutions based upon the activities or the needs of the consumer and to provide the marketing solutions.

Other objects, features, and advantages of the present
15 invention will become apparent upon review of the following detailed description of the preferred embodiments of the invention, when taken in conjunction with the drawings and the appended claims.

20 **Brief Description of the Drawings**

Fig. 1 is a flow chart showing the major steps of the present invention.

Fig. 2 is a listing showing different exemplary environments for the purchase of an item.

25 Fig. 3 is a diagram showing a representative time period: a day in the life of a Home Category Manager.

Fig. 4 is a diagrammatic representation of a typical supermarket.

30 Fig. 5 is a diagrammatic representation of a Quick Meal solution trip.

Fig. 6 is a diagrammatic representation of a typical convenient store or petroleum station.

Fig. 7 is a flow chart showing a Quick Meal Occasion-Based Marketing solution.

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Fig. 8 is a message connecting the item to a consumer need.

Fig. 9 is a flow chart showing a Shop Refreshed Occasion-Based Marketing solution.

5 Fig. 10 is a flow chart showing a Social Activities Occasion-Based Marketing solution.

Fig. 11 is a flow chart showing a Drive Refreshed Occasion-Based Marketing solution.

10 Fig. 12 is a flow chart showing a Snack Time Occasion-Based Marketing solution.

Fig. 13 is a flow chart showing an Internet Usage Occasion-Based Marketing solution.

Detailed Description of the Invention

15 The present invention is directed towards useful processes and methods for promoting the sale of an item based upon various “occasions” within the life of a typical consumer. These processes and methods have practical, real world applications as is required for patentability under the precedent of *State Street Bank & Trust Co. v. Signature Financial Group, Inc.*, 149 F.3d 20 1368 (Fed. Cir. 1998). Specifically, the present invention provides the analytical tools for creating solutions including advertising and promotions ideally suited for addressing or targeting a consumer’s needs for or uses of a particular item during these occasions. The 25 processes and methods of the present invention may be implemented manually, via a conventional personal computer and database, or, alternatively, in combination of the two.

30 Referring now to the drawings, in which like numerals refer to like steps and elements throughout the several views, Fig. 1 is a block diagram showing the major steps of the present invention. The present invention includes consideration of a consumer’s occasions or activities including those occasions for the potential use of the item (the “when”), why these activities may result in the use of or the need for a particular item or type of item (the “why”), and how the consumer shops for the particular item or items (the 35

“how”). Based upon the data created or gathered in some or all of these steps and the analysis of this data, various Occasion-Based Marketing solutions may then be employed in, around, or outside of the environment in which the consumer purchases the item or items (the “solution”). The result of these Occasion-Based Marketing solutions is an increase in both consumption occasions or use occasions and purchase occasions. For example, with edible or consumable products or ingredients such use occasions may include consumption of the product such as a beverage or use of the product, such as a beverage concentrate in creating another edible product such as a finished beverage.

The Item

The determination of a particular item **10** or items to be promoted is made in step **100**. The item **10** may be any type of product or service. In the embodiments of the present invention, the item **10** is preferably a beverage **20** and/or concentrate such as a carbonated soft drink sold under the Coca-Cola® brand name by The Coca-Cola Company of Atlanta, Georgia. Any beverage **20** would be suitable in this embodiment. The preferred beverages **20** may include coffee, tea, waters, fruit, vegetable and other juice concentrates and/or beverages, isotonic beverages, non-isotonic beverages, and milk and milk-based products. Although any type of product or service may be used, consumer-oriented products are preferred. These products are preferred because of the existing knowledge and information on consumer lifestyle and purchasing habits and, more importantly, the knowledge of how this information may be obtained and analyzed.

The Environment

The determination of the purchase environments for the item **10** is made in step **110**. This step includes an analysis of those locations where a consumer may have an opportunity to purchase, select, gain access to, or use the item **10**. A purchase environment is considered to be any environment, actual or virtual,

in which a consumer may use, purchase, or gain access to an item. The different types of relevant purchase environments for the particular item **10** are generally well known to those skilled in the art of marketing the item **10**, i.e., most manufacturers and/or distributors understand the makeup of their applicable market.

5 Other means of determining the applicable environment include a comprehensive analysis of all consumer "access points" that take place outside of traditional retail outlets, e.g., colleges, at work, in-transit, high schools, etc.

10 Depending upon the nature of the item **10**, the purchase environments may include retail environments **120**, non-retail environments **130**, and virtual environments **135** as is shown in Fig. 2. Each of these environments **120**, **130**, **135** may then be broken down into sub-categories. In the case of the beverage **20**,

15 the retail environments **120** may include supermarkets **140**, mass merchandisers **150**, drug stores **160**, club stores **170**, "up and down the street" travel **180**, and convenient stores and petroleum stations **190**. The non-retail environments **130** for the beverage **20** also may be broken into sub-categories. These sub-categories may include

20 professional offices **200**, in transit **210**, travel and leisure **220**, colleges **230**, industrial factories **240**, high schools **250**, and health care **260**.

25 The virtual environment **135** may reside within a conventional distributed network, such as the Internet, a LAN, a WAN, or more than one interconnected networks. The consumer may communicate with the distributed network through a conventional personal computer or other electronic device configured with hardware and software for connecting to the distributed network via a modem, a direct network connection, or

30 any other means of communicating with the resources of the distributed network. In addition, the consumer may be equipped with application software for allowing interaction with the services offered over the distributed network. For instance, browser software for interpreting web pages received via the distributed network. Also, the consumer may use other communication means,

- such as electronic mail (e-mail) applications, File Transfer Protocol (FTP) applications, and other file transfer applications, satellite, facsimile, and other telecommunications equipment, and the like, to interact with other the resources offered via the distributed network.
- 5 In the example of the virtual environment **135**, the consumer may shop for the item **10** via a web page. For example, the web page may be a virtual supermarket offering all of the goods normally associated with the supermarket **140** or the web page may be devoted to the item **10** itself. The consumer may access the web page by hyper-links, by on-screen banner advertising, or by other conventional means.
- 10

- 15 **The Consumers**
Referring again to Fig. 1, after the item **10** of step **100** and the environment of step **110** are evaluated, the types of consumers that typically purchase the item **10** in each selected environment are considered in step **300**. Modern marketing practice routinely divides the consumer universe into different types of consumers with similar purchasing habits. Extensive demographic, socioeconomic, and psychographic information is obtained to categorize these different types of consumers and to determine their purchasing preferences and motivations. The manner in which this information is gathered and analyzed is well known to those skilled in marketing techniques.
- 20
25 For example, information may be obtained via consumer intercept surveys in the different types of purchasing environments. Other methods include an analysis of transaction data, i.e., the analysis of sales information from checkout counter bar code readers on consumer purchases or from audit data. This information may include what is purchased, cost, frequency, time, amount, combinations of items, marketing or promotional activities or materials, etc. Further methods of determining the relevant types of consumers and their practices include one-on-one in-depth interviews with consumers, qualitative focus groups and quantitative
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consumer segmentation studies, i.e., segmenting consumers by their “nature of work.”

Based upon this data, different consumer types are categorized according to their respective purchasing practices. For example, the largest category of shoppers in the supermarket **140** environment tend to be the typical working or non-working homemaker or parent with the primary responsibility for shopping and food preparation. In marketing terms these consumers are described as “Home Category Managers”. The Home Category Manager category may account for about seventy to eighty percent of the traffic for the typical supermarket **140**. By contrast, the relevant consumers for convenient stores and petroleum stations **190** may include blue-collar young adults, teens, and white-collar adults. The relevant consumers for the virtual environment **135** may include adults and teens with a variety of levels of computer experience. Each of the different shopping environments determined in step **110** generally will have a somewhat different consumer mix determined in step **300**.

20 *The When*

After the relevant types of consumer for each environment are determined, the lifestyles and activities or the “occasions” of each type of consumer are determined in step **310** (the “when” step). Each of the different consumer types generally will engage in different types of activities at different times. These “occasions” may be considered on a “day in the life” basis, i.e., what a particular consumer type does in a representative time period such as on a daily basis, on a weekly basis, on a seasonal basis, or on any other timetable.

30 This consumer lifestyle information is similar to the extensive demographic and socioeconomic consumer information gathered and analyzed in step **300**. This information is generally gathered via quantitative attitude and usage studies as well as by quantitative segmentation studies.

As is shown in Fig. 3, the activities of the typical Home Category Manager on a typical day may include the following: step 320, wake up and breakfast at about 6:00 a.m.; step 330, in transit to work or school at about 7:30 a.m.; step 340, morning break and out and about at about 10:30 a.m.; step 350, lunch at 12:00 p.m.; step 360, afternoon break and/or after school snack at about 3:00 p.m.; step 370, after school sports and/or after work workout at about 5:00 p.m.; step 380, dinner at about 6:00 p.m.; step 390, social events at about 7:00 p.m.; step 400, evening snack at about 9:00 p.m. Further, certain any time of the day activities also may be considered. For example, step 410, shopping.

The Why

Based upon each of these activities as determined for each type of consumer, the consumer's uses or needs (both functional and emotional) for the item 10 are determined in step 420 (the "why" step). The reasons for using or needing the item 10 or the "whys" may be different for each type of consumer. The "whens" of step 310 should be comprehensive in nature so that all of the possible "whys" for a specific item 10 may be determined in step 420.

This information is also based largely on extensive demographic and socioeconomic consumer information similar to that gathered and analyzed in step 300 and elsewhere above. Further, this information may include item specific market research, i.e., information obtained by the manufacturer and/or distributor of the item 10 on how that item 10 is used and the needs addressed by the item 10. Other sources of this type of information include one-on-one in-depth interviews to uncover the emotional needs of the consumer, qualitative group research, and secondary research on changing consumers' needs.

For example, for each of the activities 320 through 410 of the typical Home Category Manager, the following needs for the beverage 20 have been determined. In the wake up and breakfast step 320, the typical Home Category Manager consumer may desire

the beverage **20** as a “wake me up” drink, a rejuvenation drink, or as a meal enhancer. In the in transit to work or school step **330**, the consumer may desire the beverage **20** for a lift or for refreshment. In the morning break and out and about step **340**, the consumer
5 may desire the beverage **20** for refreshment, for a lift, or for a “tide-me-over.” In the lunch step **350**, the consumer may desire the beverage **20** as a meal enhancer. In the afternoon break and/or after school snack step **360**, the consumer may desire the beverage
10 **20** as a tide-me-over, as refreshment, as a socializer, and as a lift. In the after school sports and/or after work workout of step **370**, the consumer may desire the beverage **20** for re-hydration and
15 rejuvenation. In the dinner step **380**, the consumer may desire the beverage **20** as a meal enhancer. In the social events step **390**, the consumer may desire the beverage **20** as a socializer, as a relaxer, or as a meal enhancer. In the evening snack step **400**, the consumer
20 may desire the beverage **20** as a treat or a tide-me-over. In the shopping step **410**, the consumer may desire the beverage **20** as refreshment, as a lift, or as a tide-me-over.

20 *The How*

After the when of step **310** and the why of step **420** are determined for each consumer type for the particular item **10** in each environment, the manner in which that particular type of consumer shops in the environment maybe determined in step **430** (the “how” step). Consideration of the “how” focuses what the consumer may seek to accomplish, on how long the consumer is in the environment, where in that environment the consumer may shop, whether the consumer may purchase the item **10** for immediate or future use, or whether the consumer may purchase the item **10** for individual, family, commercial, or group use. Other considerations include how prepared the consumer may be for the shopping trip. For example in the supermarket **140**, does the consumer have a shopping list, coupons, or a store circular.
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This “how” information is also based largely on extensive demographic and socioeconomic consumer information
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similar to that gathered and analyzed in step 300 and elsewhere above. For example, this information may be obtained via consumer intercept surveys and by analysis of transactional information such as scanner or audit data. Other methods of gathering and analyzing this information include videotaping consumers' foot patterns through out a shopping trip and qualitative "shop-with" interviews in which the researcher interacts with and experiences the shopping trip with the consumer.

Each type of environment generally will be arranged in a different manner so as to address the needs of its specific types of customers. As is shown in Fig. 4, the typical supermarket 140 will have different departments within the store that are organized for different types of shopping missions. For example, the typical supermarket 140 will generally include departments such as produce, prepare foods, deli/bakery, meat/fish, beverages, dairy, frozen, video, service counter, and checkout. These departments are organized and arranged so as to cater to different types of shopping missions.

The shopping missions within this environment may include immediate or future consumption trips. Each of these different types of shopping missions may take the consumer into different departments of the supermarket 140. For example, immediate consumption trips may include a "Quick Mission" trip focusing on the quick pick up of one or two items 10 or a "Quick Meal Solutions" trip focusing on the prepared foods area along with the deli/bakery to purchase the items 10 needed for a meal that day. Fig. 5 shows the typical path of a shopper on a Quick Meal Solution trip. As is shown, the shopper travels directly to the prepared foods or deli department and then directly to the checkout counter. Other areas of the environment, such as the beverage aisle, may be missed by the consumer during this type of shopping trip. Conversely, future consumption trips may include an "Unprepared Stock-Up" trip focusing on a shopper obtaining those items used week in and week out without a shopping list and a "Prepared Stock-Up" trip focusing on the shopper with a long list of items needed for an

extended period of time. The consumer on the Stock-Up trips may travel through most of the various departments within the supermarket **140**.

As is shown in Fig 6, the typical convenience store or petroleum station **190** also has different types of departments organized for different types of shopping missions. For example, a typical convenient store or petroleum station **190** will generally include departments or areas such as the pumps, the coolers, the food aisles, the checkout counter, and the outside ice cooler.

Relevant shopping missions may include the "Get Up 'n Go" at about 7:30 a.m.; "Workin' Lunch" at about noon; "School's Out" at about 3:00 p.m.; and "Quittin Time" at about 5:30 p.m. Other trips may include "Gas and Go" trip in which the consumer fills up his or her car and pays at the pump without coming inside the store; the "Inside Pay" trip in which the consumer fills up his or her car and then pays for the gas inside; and the "Quick Pick Up" trip in which the consumer picks up snacks, beverages, or staple items.

Again, each of these shopping missions may take the consumer into different departments within the convenience store or petroleum station **190**.

The Solutions

Based upon the "when" of step **310**, the "why" of step **420**, and the "how" of step **430** (or any combination of these steps), the present invention leads to an Occasion-Based Marketing solution of step **550**. The Occasion-Based Marketing solutions of step **550** combine and supplement traditional retail solutions **560** with consumer solutions **570**. If the "whens" of step **310** are comprehensively determined, the Occasion-Based Marketing solutions **550** may be systematically determined so as to address each possible use or consumption occasion for the item **10** and also to prioritize these uses and occasions.

In the context of the beverage **20**, the traditional retail solutions **560** include consideration of the appropriate brands **580** and the appropriate packaging **590**. The appropriate brands **580**

include, for example, those brands or types of the item **10** that appeal to the kind of consumer that shops in a given environment. For example, a low calorie carbonated soft drink may appeal to the Home Category Manager while a regular or sugared soft drink or a sports beverage may appeal to the teenage shopper. The appropriate packaging **590** focuses on providing the right size and shape for the item **10** for the particular customer and shopping mission. In the case of the beverage **20**, for example, a single serving package may appeal to those consumers on a Quick Mission trip or a Quick Meal Solution trip while six-packs, twelve-packs, or two-liter bottles may appeal to those consumers on stock-up trips. In this example, other considerations include the temperature of the beverage **20**. Depending upon the nature of the beverage **20**, the packaging **590** intended for immediate consumption may be refrigerated while packaging **590** intended for future use may be stored at room temperature.

Selection of the appropriate brands **580**, the appropriate packaging **590**, and other types of traditional retail solutions **560** is based largely on the extensive demographic and socioeconomic consumer information similar to that gathered in step **300** and elsewhere above. Other sources of information may include quantitative attitude and usage studies as well as packaging segmentation studies.

Another traditional retail solution **560** is the appropriate price for the item **10**. As described above, although price is a fundamental purchase trigger, the price of the item **10** is *not* the primary focus of the present invention. Rather, the present invention seeks to motivate the consumer based upon the consumer's needs and uses of the item **10**, i.e., how the consumer uses the item **10**, as opposed to how the consumer purchases the item **10**.

Specifically, the consumer solutions **570** of the present invention focus on creating a demand for the item **10** within the environment by suggesting how the item **10** serves a purpose or fulfills a need for the consumer. The item **10** may address this

purpose or fulfill this need either at the present within the environment or in the future outside of the environment. The need may be emotional or functional. The consumer solutions **570** therefore include the appropriate merchandising **600** in combination with the appropriate messaging **610**. The merchandising **600** and the messaging **610** are strategically placed within the environment so as to be relevant to the manner in which a particular type of consumer shops.

The appropriate merchandising **600** focuses on where in the environment the item **10** is located and how the item **10** is presented to the consumer. For example, the beverage **20** may be placed in the beverage aisle, in end-aisle displays ("end caps"), in lobby displays, and almost anywhere else within the environment. The item **10** also may be positioned, priced, and/or sold in combination with other items ("bundling"). Bundling creates a convenient solution for the consumer and an association in the consumer's mind between the respective items **10** that are sold together. For example, the beverage **20** may be sold together with a frozen pizza. The beverage **20** may be positioned directly adjacent to the frozen pizza freezer. This positioning has the advantage of creating an association in the consumer's mind between the two items **10** and also places the beverage **20** in an area of the environment that the consumer may not normally reach. In other words, the beverage **20** will be located in the frozen foods or prepared foods section of the supermarket **140** in addition to being located in the beverage aisle.

The messaging **610** also focuses on the uses of the item **10** by the consumer, particularly how the item **10** fulfills a need of the consumer. The messaging **610** includes both the substance of the message and the medium of the message. For example, the substance of the messaging **610** may explain how the beverage **20** may solve a consumer's emotional or functional need or how the beverage **20** serves a purpose. In the pizza example, the substance of the messaging **610** may be to create an association within the consumer's mind between the beverage **20** and the frozen pizza.

This association may suggest the use of the beverage **20** as a meal enhancer with dinner.

The medium of the messaging **610** may take the form of in-store greeters, print advertising, outdoor signage, bill boards, and event-oriented signage such as in ballparks, stadiums, race tracks, parks, community centers, and the like. The messaging **610** also may take the form of radio, television, film, or Internet advertising, in store displays, banners, headers, and the like. The messaging **610** also may combine several types of media in one location. For example, an in-store display may include print advertising, sound, and video. The video may provide the messaging **610** by connecting the item **10** to the particular need or activity. Further, the messaging **610** may include any type of sensory experience, including the sense of smell. Studies have shown that both music and smell may have a significant impact of mood and stress reduction.

The messaging **610** also may be placed on the item **10** itself, on packaging or containers for the item **10**, or on shelves, coolers, vending machines holding the item **10**, or other types of dispensing mechanisms or systems. The messaging **610** also may be found on other branded products from other manufacturers/distributors aligned with the manufacturer/distributor of the item **10**. In other words, any traditional form of advertising medium may be used. Alternative merchandising **600** and/or messaging **610** also may include merchandising devices or equipment, promotional items or contests, dispensing or product enhancement technology, and branded associated items such as a thermal can.

The present invention therefore goes beyond the traditional marketing strategy of availability and price, i.e., placing the item **10** “within an arm’s reach of desire”, to creating a need for the item **10** based upon the consumer’s activities, i.e., to “create desire within arm’s reach.” The merchandising **600** and the messaging **610** therefore include both the item **10** itself and the consumer’s uses and needs for the item **10**. The present invention

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thus goes beyond such traditional marketing approaches by connecting the use of the item **10** to the specific needs of the consumer.

5 ***The Result***

The culmination of the Occasion-Based Marketing solutions **550** is a capture and create step **555**. The capture and create step **555** focuses on capturing the consumer's existing use occasions, i.e., when the consumer currently uses the item **10**, and also to suggest and create future occasions. In other words, if the consumer has never thought of combining a beverage **20** with a frozen pizza, the Occasion-Based Solutions of step **550** may create such an occasion. By increasing demand for the use of the item **10**, i.e., a consumption or use occasion, increased sales or use of the item, i.e., the purchase occasion, should follow. A purchase occasion may include any instance where a consumer may buy, gain access to, or use the item **10** regardless of whether a commercial transaction occurs. The increase in purchase occasions lead directly to increased value for both the manufacturer and/or distributor of the item **10** and the owner/operator of the local supermarket **140** or other purchase environment. Importantly, the Occasion-Based Marketing solutions **550** reflect the essence of the item **10** and build brand equity in the item **10** by connecting the functional and emotional benefits and uses of the item **10** to the consumption or use occasions.

20 ***Examples***

25 ***Quick Meal Solutions***

Fig. 7 shows the application of the present invention. In this example, the item **10** is the beverage **20**, the environment is the supermarket **140**, and the consumer is the Home Category Manager. Based upon the day in the life activities of Fig. 3, dinner is selected as the occasion or the "when" of step **310** with the accompanying need or the "why" of step **420** being a meal enhancer. The manner in which the Home Category Manager

shops or the "how" of step 430 is divided into the Quick Meal Solutions trip and Stock-up trip. The Occasion-Based Marketing solutions 550 of the present invention are then directed towards these two types of shopping trips.

With respect to the Quick Meal Solutions trip, marketing studies conducted in association with step 430 show that the Home Category Manager needs quick, efficient, good quality, and complete beverage and meal solutions that he or she can feel good about serving to his or her family. This is particularly true today given the fact that about seventy-six percent (76%) of all women between the ages of 25 and 54 are working according to U.S. Bureau of Labor statistics. Further, the vast majority of consumers today plan their dinners at the last minute. According to a National Restaurant Association survey in 1997, about seventy percent (70%) of consumers do not know what they will have for dinner that day by as late as 4:00 p.m. Further, although about ninety percent (90%) of consumers drink a beverage with their meals, only a fraction of these consumers consider a beverage purchase when buying their meals. Specifically, only about eight percent (8%) consider a drink when they buy their meal according to a Home Meal Replacement study in 1997. In sum, the Home Category Manager on the Quick Meal Solutions trip is in a hurry, does not have a specific idea as to what to purchase, and needs to be reminded to purchase the beverage 20.

Based upon this consumer information, the solutions of step 550 are determined. First, the retail solutions 560 for the beverage 20 in the context of the Quick Meal Solutions trip are determined. Specifically, the appropriate brands 580 and the appropriate packaging 590 are determined. In this example, the packaging 590 focuses on both immediate consumption packaging, i.e., single items such as cans or fountain cups, and larger containers for future consumption such as take home use, i.e., multipacks of cans or two-liter bottles.

Based upon the typical traffic pattern of the Quick Meal Solution trip as shown in Fig. 5, the merchandising 600 and

the messaging **610** are placed in the direct path of the consumer, i.e., in the frozen foods section, in the prepared foods section, in the deli/bakery section, and elsewhere. For example, the merchandising **600** may include placing the beverage **20** directly adjacent to or within the frozen pizza section. The messaging **610** may then associate the beverage **20** with the fulfillment of the consumer's need, i.e., as a meal enhancer with the pizza dinner. As is shown in Fig. 8, the message **610** may read: "Pizza & Cola Brand A - Complete Your Meal With Real Refreshment!" Further, the supermarket **140** may use combination offers in which the pizza and the beverage **20** are sold for a set price to add convenience and value for the consumer. In other words, the supermarket **140** will bundle a pizza and a two-liter beverage **20** such as a carbonated soft drink for one price. The consumer is therefore motivated to purchase the beverage **20** because it fulfills the need for a meal enhancer with the pizza dinner. Further, the physical bundling of the beverage **20** and the pizza provides a great deal of convenience to the consumer.

Similar consumer solutions **570** for the Quick Meal Solution trip for the Home Category Manager may include merchandising **600** and messaging **610** bundling the beverage **20** with other types of frozen foods. Likewise, the beverage **20** may be bundled with any type of prepared foods or deli foods. The goal of the merchandising **600** is to have the beverage **20** in the immediate vicinity of these other items. The goal of the messaging **610** is to connect the use of the beverage **20** with the use of the other item, i.e., "Cola Brand A & Chicken", "Cola Brand A & Deli Sandwiches", or "Cola Brand A & Lasagna". The messaging **610** therefore explains to the consumer why the beverage **20** should be bought based upon the creation of solutions for the consumer's activities rather than promoting the item **10** merely on the basis of price.

The value of the present invention may be seen by research showing the increase in the consumer traffic in a particular environment, the increase in sales, and the increase in profit. For

example, research has shown that the supermarket **140** may see a significant increase in the sale of the beverage **20** such as the carbonated soft drink by promoting the carbonated soft drink with the frozen pizza. Seventy-eight percent (78%) of average pizza units per store are currently sold without a beverage (according to the Progressive Grocer 1996 Annual Report concerning bottler reports). The Occasion-Based Marketing solutions of step **550** resulted in a twenty-five percent (25%) increase in the conversion rate or capture rate of step **555**. In other words, twenty-five percent (25%) or more consumers bought a frozen pizza with a beverage **20**. If the carbonated soft drink purchase price is about a \$2.50 for a six-pack of half-liter bottles and the average gross margin is about 14.8%, the typical supermarket **140** may see an incremental increased profit of about \$7853.00 per year.

Specifically, the value of the present invention may be shown as follows:

Traffic	Incidence	Average Transaction Amount	Average Gross Margin % Per Transaction	\$ Value
# of Pizza Shoppers	Conversion %	\$	Gross Profit + Selling Price	\$
84,897	25%	\$2.50	14.8%	\$7853/ Store/Year

This calculation of incremental value added by the methods and systems of this invention may be utilized to analyze any solution provided by this invention.

Shop Refreshed

Another example of the present invention focuses on an any time of the day activity by the Home Category Manager, the

shopping trip **410**. As is shown in Fig. 9, the “when” of step **310** is shopping, the beverage need of the Home Category Manager during this activity, or the “why” of step **420**, is for a treat, refreshment, or a tide-me-over. The type of shopping trip, or the “how” of step **430**, may be the Stock-up trip. The typical consumer may spend an average of thirty (30) minutes or more on these Stock-Up trips.

The Occasion-Based Marketing solution **550** for this example is a “Shop Refreshed” program. This solution **550** includes traditional solutions **560** such as consideration of the brands **580** and the packaging **590**. The packaging **590** in this example would focus on immediate consumption packages such as refrigerated single serving packages or fountain cups. The consumer solutions **570** may then include the appropriate merchandising **600** and the appropriate messaging **610**. In this case, the merchandising **600** may include a cooler and a display positioned directly by the front entrance of the supermarket **140**. The cooler is filled with the packaging **590** described above. The messaging **610** may include large banners or other display advertisements reading “Shop Refreshed with Cola Brand A” or similar messages offering the beverage **20** as a solution to the thirsty work of shopping. Given that it may seem unusual to consume the beverage **20** while the consumer is shopping, a greeter may be used to offer the beverage **20** to the consumer and to explain that it is acceptable and encouraged to consume the beverage **20** while shopping and to pay for it at checkout. Alternatively, additional types of messaging **610** may be used to convey this message. After the consumer has finished the beverage **20** and paid for it at checkout, a recycling bin may be available for the empty container.

A further aspect of the messaging **610** may include specially designed item containers or dispensers such as shopping cart caddies or shopping baskets to carry and support the beverage **20** while the consumer shops. An example of such a specially designed shopping basket with an integral bottle or can holder is shown in provisional U.S. patent application Serial No. 60/091,739.

The shopping carts or baskets themselves also may include messaging **610** promoting the beverage **20** as a solution to the thirsty work of shopping.

Studies have established that this type of Occasion-Based Marketing solution **550** may increase a supermarket's incremental profit on the sale of the beverage **20** by over \$13,000 per year. For example, if the number of shoppers in the supermarket **140** is approximately 385,906 per year and only ten percent (10%) participate by obtaining the beverage **20** when entering the store, i.e., the capture of step **555**, the supermarket **140** may see an increased profit of about \$13,800 per year based upon an average price of about 89¢ per bottle and a 40% average gross margin per transaction.

15 *Social Activities*

Fig. 10 shows a further example of the present invention. In this case, the occasion or the "when" of step 310 is a social activity. The consumer's use or need for the beverage 20 or the "why" of step 420 is as a socializer, a relaxer, or as a meal enhancer. The nature of the shopping trip or the "how" of step 430 is either the Stock-up trip or the Quick Mission trip.

The Occasion-Based Marketing solutions **550** of this example focus on connecting the beverage **20** with consumer's needs during the social event. In this case, the packaging **590** may focus on future consumption packages such as multipack cans and two-liter bottles. The merchandising **600** will depend upon the nature of the social event. Social events may change seasonally and cover everything from football, baseball, barbecuing, or holidays. As such, the merchandising **600** may include a modular, moveable display event with visual promotions and products. This display then can be moved to the various supermarket departments depending upon the specific social event. For example, the display may be placed in the candy department during Halloween or in the meat department during barbecue season. The messaging **610** will tie the specific social event to the use of the beverage **20**, such as

"Cola Brand A & Barbecuing". Further, the beverage **20** also may be bundled with other products related to the social event.

Studies have established that this type of Occasion-Based Marketing solution **550** may increase a supermarket's incremental profit on the sale of the beverage **20** by more than \$12,000 per year. For example, if the number of shoppers in the supermarket **140** that do not purchase a beverage during a weekly trip is approximately 5,173 and only ten percent (10%) participate by obtaining the beverage **20**, i.e., the capture of step **555**, the supermarket **140** may see an increased profit of about \$12,312 per year based upon at an average price of \$1.19 per six-pack and a 23.1% average gross margin per transaction.

Drive Refreshed

15 A further example of the present invention is shown in
Fig. 11. In this case, the environment of step **110** is the
convenience store or the petroleum station **190**. The consumer of
step **300** includes adults between the ages 18 and 49. The occasion
or the "when" of step **310** is in transit. The consumer's use or
need for a beverage or the "why" of step **420** is for refreshment.
20 The manner in which the consumer shops is the Gas and Go trip
with pay at the pump or the Inside Pay trip. In either case, the
convenience store or the petroleum station **190** only has a matter of
minutes to promote and sell the beverage **20**.

The Occasion-Based Marketing solutions **550** of the present example remind the consumer to "Drive Refreshed" with the beverage **20**. In this case, the packaging **590** is directed at immediate consumption such as refrigerated single serving bottles or cans. The merchandising **600** focuses on placing the beverage **20** either at the gas island itself or at the check out counter. The gas island merchandising **600** may include a vending machine that takes cash or credit cards. Further, the vending machine may be tied to the purchase of the gasoline such that the consumer can combine the purchases. The merchandising **600** inside the store may include one or more coolers positioned at the check out counter so as to

encourage an impulse purchase. The messaging **610** may promote the beverage **20** as solving the consumer's need to be refreshed while driving, e.g., "Drive Refreshed With Cola Brand A."

5 ***Snack Time***

Fig. 12 shows a further example using the convenience store or the petroleum station **190** environment. In this case, the consumer of step **300** includes blue-collar adults aged 18 through 34 and teens aged 13 through 17. The occasion or the "when" of step **310** is after school or after work and the needs or the "why" of step **420** include refreshment, energy, and a tide-me-over. The manner in which the consumer shops or the "how" of step **430** may be the "Quick Pick Up" trip, the "School's Out" trip, or the "Quittin Time" trip.

15 The Occasion-Based Marketing solutions of the present example remind the consumer to purchase the beverage **20** with the snacks. In this case, the packaging **590** is directed at immediate consumption such as refrigerated single serving bottles or cans. The merchandising **600** focuses on placing the beverage **20** in combination with various types of snacks. For example, a "snack center" may be used containing a cooler for the beverage **20** and shelves for different types of snacks. Further, a "teen zone" section of the store may have a barrel of cold beverages **20** such as carbonated soft drinks placed adjacent to the snack section or other youth related items. The messaging **610** would focus on tying the beverage **20** to the snacks, e.g., "Cola Brand A with Snacks" or "Snacking Time is Cola Brand A Time".

20 ***Internet Use***

30 Fig. 13 shows a further example using the virtual environment **135**. In this case, the consumer of step **300** includes teenagers, college students, and other computer-oriented adults. The occasion or the "when" of step **310** is "Internet Usage" and the needs or the "why" of step **420** includes refreshment, energy, rejuvenation, or a meal enhancer. The manner in which the

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consumer shops or the “how” of step **430** may be the Stock-up trip or many other variations.

5 The Occasion-Based Marketing solutions **550** of the present example may include almost any type of the appropriate brands **580** and the appropriate packaging **590**. The merchandising **600** may focus on on-screen advertising of various types. The messaging **610** may remind the consumer to purchase the beverage **20** with the other items in his or her electronic shopping cart. For example, if the consumer is in a virtual supermarket or similar e-commerce entity, information on the consumer’s purchase 10 selections may cause the messaging **610** to appear. The direction of Internet advertising based upon a consumer’s “clicks” or surfing habits is well known to those skilled in the art. This messaging **610** may be a banner or other types of on-screen advertising promoting 15 the beverage **20**.

As in the supermarket **140** example given above, the selection of a frozen pizza may cause the on-screen messaging **610** to appear tying the beverage **20** with the fulfillment of the consumer’s need, i.e., a meal enhancer with the pizza dinner. 20 Specifically, the message **610** may read: “Pizza & Cola Brand A - Complete Your Meal With Real Refreshment!” Similar messaging **610** also may be directed towards the consumer’s needs while surfing, such as “Surf Refreshed with Cola Brand A.”

25 **Implementation**

The present invention may be implemented in various ways. As is described above, the following steps all require considerable types and amounts of consumer marketing and lifestyle information:

- 30 determining the environment of step **110**;
 determining the type of consumer of step **300**;
 determining the occasion or the “when” of step **310**;
 determining the needs or the “why” of step **420**; and
 determining the shopping manner or the “how” of
35 step **430**.

The manner in which this information is gathered and analyzed is described in detail above. Regardless of how the data is obtained, the data from each step listed above may be stored with the Occasion-Based Marketing solutions of step **550** in one or more conventional interactive databases and manipulated by one or more conventional personal computers. The personal computer may include a processor and an input device. The database may be a memory storage device associated with the personal computer or the database may be a separate device. The personal computer and the database may be configured for the execution of a database management system. The database management system is operable for inserting, modifying and extracting data from the database and/or the memory storage device.

Specifically, the manipulation of at least the data concerning the "when" of step **310** with the "why" of step **420** provides the basis for the Occasion-Based Marketing solutions of step **550**. Although, the Occasion-Based Marketing solutions of step **550** also may involve marketing creativity and artistic talent in conveying the messaging **610**, the substance of the messaging **610** and the other aspects of the Occasion-Based Marketing solutions **550** are based upon the manipulation of the data of at least steps **310**, **420**, and perhaps other types of input such as data from step **430** concerning "how" the consumer shops.

Specifically, the flow charts in Figs. 1, 7, 9-13 provide a detailed description of the process steps of the present invention. These flow charts are equivalent to a detailed schematic for an electrical circuit in that the flow chart blocks may correspond to actual computer instructions. Thus, the coding of the process steps of these flow diagrams into instructions for suitable commercially available computers is a mere mechanical step for one skilled in the programming arts.

Once the solutions of step **550** are developed and stored within the database, these solutions **550** may be used by the manufacturer and/or distributor of the item **10** to create advertising on a local, regional or national basis directed towards a specific type

of consumer, a specific activity, and/or a specific product need. The manufacturer and/or distributor may create a number of Occasion-Based Marketing solutions of step **550** targeting various types of consumer activities and needs. These solutions may then be
5 accessible, for example, to the operator of the local supermarket **140** via computer disk, tape drive, or other conventional data transfer media. Alternatively, the solutions **550** of the present invention may be accessible on-line or over the Internet. Any conventional data distribution system or network may be used. The local store
10 owner/operator would then have a great deal of freedom in implementing the various Occasion-Based Marketing solutions **550** tailored to that specific environment while the national manufacturer and/or distributor is guaranteed a consistent advertising campaign. Likewise, the processes of the present invention could be used by
15 the owner/operator of a single supermarket **140** or other environment. The operator could determine how to market the particular item **10** to suit a particular need or occasion.

Other computer based applications of the present invention include use by retailers or by others in alliance with a manufacturer/distributor of the item **10** to maximize the volume and revenue of all of their product categories beyond core products such as beverages. Additionally, there is significant opportunity to apply broadly these processes to Internet shopping once that channel becomes a significant portion of targeted industries such as the food
20 and beverage industry.
25

It should be apparent that the foregoing relates only to the preferred embodiments of the present invention and that numerous changes and modifications may be made herein without departing from the spirit and scope of the invention as defined by the following claims.
30

CLAIMS

We claim:

- 5 1. A method for promoting the selection of an item
by a predetermined type of consumer, said method comprising the
steps of:
 determining one or more representative activities of
said predetermined type of consumer;
10 determining one or more representative uses of said
item by said predetermined type of consumer during said one or
more representative activities; and
 creating demand for said item by said predetermined
type of consumer based upon said one or more representative uses
15 of said item by said predetermined type of consumer during said
one or more representative activities.
- 20 2. The method of promoting the selection of an item
of claim 1, wherein said step of determining one or more
representative activities of said predetermined type of consumer
comprises analysis of said one or more representative activities
within a predetermined length of time.
- 25 3. The method of promoting the selection of an item
of claim 1, wherein said step of determining one or more
representative activities of said predetermined type of consumer
comprises gathering consumer lifestyle information.
- 30 4. The method of promoting the selection of an item
of claim 3, wherein said step of determining one or more
representative activities of said predetermined type of consumer
comprises analysis of said consumer lifestyle information.

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5. The method of promoting the selection of an item of claim 1, wherein said predetermined type of consumer comprises a home category manager and wherein said one or more representative activities is an event selected from the group consisting of wake up, breakfast, in transit to work, in transit to school, morning break, lunch, afternoon break, after school snack, after school sports, after work workout, dinner, social events, evening snack, and shopping.

10 6. The method of promoting the selection of an item of claim 5, wherein said item comprises a beverage and wherein said one or more representative uses is a need selected from the group consisting of refreshment, lift, meal enhancer, socializer, re-hydration, relaxer, treat, and a tide-me-over.

15 7. The method of promoting the selection of an item of claim 6, wherein said step of creating demand for said item comprises messaging directed to said home category manager suggesting use of said beverage as said meal enhancer with said dinner.

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8. The method of promoting the selection of an item of claim 6, wherein said step of creating demand for said item comprises messaging directed to said home category manager suggesting use of said beverage as said refreshment during said shopping.

9. The method of promoting the selection of an item of claim 1, wherein said predetermined type of consumer comprises blue-collar adults and teens and wherein said one or more representative activities is an event selected from the group consisting of after school, afternoon, and after work.

10. The method of promoting the selection of an item of claim 9, wherein said item comprises a beverage and wherein said one or more representative uses is a need selected from the group consisting of refreshment, energy, and a tide-me-over.

11. The method of promoting the selection of an item of claim 10, wherein said step of creating demand for said item comprises messaging directed to said blue-collar adults and teens suggesting use of said beverage as said energizer during said afternoon.

12. The method of promoting the selection of an item of claim 1, wherein said step of determining one or more representative uses of said item by said predetermined type of consumer during said one or more representative activities comprises gathering of consumer purchase information.

13. The method of promoting the selection of an item of claim 12, wherein said step of determining one or more representative uses of said item by said predetermined type of consumer during said one or more representative activities comprises analysis of said consumer purchase information.

25 14. The method of promoting the selection of an item of consumer of claim 1, wherein said step of creating demand comprises messaging promoting said item as addressing a need associated with said one or more representative uses.

30 15. The method of promoting the selection of an item of consumer of claim 1, wherein said step of creating demand comprises messaging associating said item with said one or more representative activities.

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16. The method of promoting the selection of an item of claim 1, wherein said step of creating demand for said item comprises selection of one or more brands of said item.
- 5 17. The method of promoting the selection of an item of claim 16, wherein said one or more brands comprise predetermined beverage brands.
- 10 18. The method of promoting the selection of an item of claim 16, wherein said one or more brands of said item is a liquid selected from the group consisting of coffee; tea; water; fruit, vegetable and juice concentrates; fruit, vegetable and juice beverages; isotonic beverages; non-isotonic beverages; milk and milk byproducts; carbonated soft drinks; and soft drink concentrate.
- 15 19. The method of promoting the selection of an item of claim 16, wherein said step of selecting one or more brands comprises selection of one or more food and beverage brands.
- 20 20. The method of promoting the selection of an item of claim 1, wherein said step of creating demand for said item comprises selection of packaging.
- 25 21. The method of promoting the selection of an item of claim 20, wherein said step of selecting packaging comprises selection of a predetermined package.
- 30 22. The method of promoting the selection of an item of claim 20, wherein said packaging comprises immediate consumption packaging.
23. The method of promoting the selection of an item of claim 20, wherein said packaging comprises future consumption packaging.

24. The method of promoting the selection of an item of claim 1, wherein said step of creating demand for said item comprises selection of merchandising.
- 5 25. The method of promoting the selection of an item of claim 24, wherein said merchandising comprises bundling the location of said item with a different item.
- 10 26. The method of promoting the selection of an item of claim 25, further comprising messaging promoting said bundling of said item with said different item.
- 15 27. The method of promoting the selection of an item of claim 24, wherein said merchandising comprises bundling the offering of said item with a different item.
- 20 28. The method of promoting the selection of an item of claim 27, further comprising messaging promoting said bundling of said item with said different item.
- 25 29. The method of promoting the selection of an item of claim 1, wherein said step of creating demand for said item comprises selection of messaging.
- 30 30. The method of promoting the selection of an item of claim 29, wherein said messaging comprises media advertising.
- 35 31. The method of promoting the selection of an item of claim 30, wherein said messaging is advertising selected from the group consisting of print; radio, television, satellite and cable broadcasting; Internet, e-mail, and computer transmissions; telecommunications; event-based marketing; and direct mail.

32. The method of promoting the selection of an item of claim 29, wherein said messaging comprises in-store displays.
- 5 33. The method of promoting the selection of an item of claim 29, wherein said messaging comprises out-doors displays.
- 10 34. The method of promoting the selection of an item of claim 29, wherein said messaging comprises the name of said item and said one or more representative uses.
- 15 35. The method of promoting the selection of an item of claims 29, wherein said messaging comprises the name of said item and said one or more representative activities.
- 20 36. The method of promoting the selection of an item of claim 1, further comprising the step of determining an environment in which said item is offered.
- 25 37. The method of promoting the selection of an item of claim 36, wherein said environment comprises a retail environment.
- 30 38. The method of promoting the selection of an item of claim 36, wherein said environment comprises a virtual environment.
39. The method of promoting the selection of an item of claim 36, further comprising the step of determining the manner in which said predetermined type of consumer selects said item in said environment.

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40. The method of promoting the selection of an item of claim 39, wherein said step of determining the manner in which said predetermined type of consumer selects said item in said environment comprises consumer intercept surveys.
- 10
41. The method of promoting the selection of an item of claim 39, wherein said step of determining the manner in which said predetermined type of consumer selects said item in said environment comprises analysis of transactional data.
- 15
42. The method of promoting the selection of an item of claim 39, wherein said manner in which said predetermined type of consumer selects said item comprises a purchasing trip selected from the group consisting of quick mission trips, quick meal solution trips, and stock-up trips.
- 20
43. The method of promoting the selection of an item of claim 39, wherein said step of creating demand for said item comprises displays located at a location distant from said environment.
- 25
44. A computer-readable medium having computer-executable instructions for performing the steps recited in claim 1.
45. A computer-readable medium having computer-executable instructions for performing the steps recited in claim 39.

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46. A method for promoting the selection of an item
in a predetermined purchase environment by a predetermined type
of consumer, said method comprising the steps of:
5 determining representative activities of said
predetermined type of consumer;
 determining representative uses for said item by said
predetermined type of consumer during said representative
activities;
10 determining the manner in which said predetermined
type of consumer selects said item in said predetermined shopping
environment; and
15 creating demand for said item by said predetermined
type of consumer in said predetermined purchase environment
based upon said manner in which said predetermined type of
consumer selects said item and upon one or more of said uses of
said item by said predetermined type of consumer during one or
more of said activities.
- 20 47. The method of promoting the selection of an
item of claim 46, wherein said predetermined type of consumer
comprises a home category manager and wherein said
representative activities is an event selected from the group
consisting of wake up, breakfast, in transit to work, in transit to
25 school, morning break, lunch, afternoon break, after school snack,
after school sports, after work workout, dinner, social events,
evening snack, and shopping.
- 30 48. The method of promoting the selection of an
item of claim 47, wherein said item comprises a beverage and
wherein said representative use is a need selected from the group
consisting of refreshment, lift, meal enhancer, socializer, re-
hydration, relaxer, treat, and a tide-me-over.

49. The method of promoting the selection of an item of claim 48, wherein the manner in which said predetermined type of consumer selects said item comprises a shopping trip selected from the group consisting of quick mission trips and quick meal solution trips.

5 50. The method of promoting the selection of an item of claim 48, wherein the manner in which said predetermined type of consumer selects said item comprises a stock-up shopping trip.

10 51. The method of promoting the selection of an item of claim 49, wherein said step of creating demand for said item comprises messaging directed to said home category manager during said quick meal solution trip suggesting use of said beverage as said meal enhancer with said dinner.

15 52. The method of promoting the selection of an item of claim 50, wherein said step of creating demand for said item comprises messaging directed to said home category manager suggesting use of said beverage as said refreshment during said stock-up shopping trip.

53. A method for promoting the selection of a beverage by a consumer, comprising the steps of:
determining the daily activities of said consumer;
determining the needs of said consumer for said beverage during said daily activities; and
marketing said beverage in association with said needs of said consumer for said beverage during said daily activities.

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54. A method for determining the effectiveness of an occasioned-based marketing campaign for the selection of an item within a purchasing environment, comprising the steps of:
- 5 determining the number of said items selected within said purchasing environment during a first predetermined interval;
- 10 determining one or more types of shoppers for said item in said purchasing environment;
- 15 determining representative activities of said one or more types of shoppers;
- 10 determining representative uses for said item during said representative activities of said one or more types of shoppers;
- 15 deploying solutions within said purchasing environment to create demand for said item by said one or more types of shoppers based upon one or more of said representative uses of said item during one or more of said representative activities;
- 20 determining the number of said items selected within said purchasing environment during a second predetermined interval, said second predetermined interval occurring after said deploying step; and
- 25 determining the difference between the number of said items purchased during said first predetermined interval and said second predetermined interval.
55. The method for determining the effectiveness of an occasioned-based marketing campaign of claim 54, further comprising the step of determining the average transaction amount for said item.
- 30 56. The method for determining the effectiveness of an occasioned-based marketing campaign of claim 55, further comprising the step of determining the average gross profit margin for said item.

57. The method for determining the effectiveness of
an occasioned-based marketing campaign of claim 56, further
comprising the step of determining the amount of money received
based upon said difference between the number of said items
purchased during said first predetermined interval and said second
predetermined interval, the average transaction amount for said
item, and the average gross profit margin for said item.

58. A computer-readable medium having stored thereon a data structure, said data structure comprising:
- 5 a first data field containing data representing one or more activities of a predetermined type of consumer;
 - a second data field containing data representing one or more uses of an item by said predetermined type of consumer based upon said data representing one or more activities; and
 - 10 a third data field containing data representing one or more marketing solutions for the sale of said item to said predetermined type of consumer based upon said data representing one or more uses of said item.

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59. A method for promoting the use of an item by a predetermined type of consumer, said method comprising the steps of:
5 receiving data corresponding to representative activities of said predetermined type of consumer;
storing said data corresponding to said representative activities of said predetermined type of consumer in a marketing database;
10 receiving data corresponding to representative uses of said item by said predetermined type of consumer;
storing said data corresponding to said representative uses of said item by said predetermined type of consumer in said marketing database;
15 determining a relationship between said data corresponding to said representative activities of said predetermined type of consumer and said data corresponding to said representative uses of said item by said predetermined type of consumer; and
 storing said relationship in said marketing database.
- 20 60. The method for promoting the use of an item of claim 59, further comprising the step of creating messaging associating said item with said relationship.
- 25 61. The method for promoting the use of an item of claim 60, further comprising the step of storing said messaging in said marketing database.
- 30 62. The method for promoting the use of an item of claim 61, further comprising the steps of receiving data corresponding to the conversion rate of said predetermined types of consumers in response to said messaging associating said item with said relationship and storing said data corresponding to said conversion rate of said predetermined types of consumers in said marketing database.

63. The method for promoting the use of an item of
claim 62, further comprising the steps of receiving data
corresponding to the average transaction amount for said item and
storing said data corresponding to said transaction amount in said
marketing database.
- 5
64. The method for promoting the use of an item of
claim 63, further comprising the steps of receiving data
corresponding to the average gross profit margin for said item and
storing said data corresponding to said average gross profit for said
item in said database.
- 10
65. The method for promoting the use of an item of
claim 64, further comprising the step of determining the value of
said messaging based upon said conversion rate, said average
transaction amount for said item, and said average gross profit
margin for said item.
- 15

66. A system for facilitating the use of an item by a predetermined type of consumer comprising:
- a storage device; and
 - a processor connected to said storage device,
- 5 said storage device storing a program for controlling the processor;
- said storage device storing data representing one or more activities of said predetermined type of consumer;
 - said storage device storing data representing one or more needs of said predetermined type of consumer for said item;
 - said storage device storing data representing one or more marketing solutions promoting the use of said item by said predetermined type of consumer; and
- 10 said processor operative with said program to receive a request for said one or more marketing solutions based upon said one or more activities or said one or more needs of said predetermined type of consumer and to provide said one or more marketing solutions.
- 15
- 20

METHODS AND SYSTEMS FOR OCCASION-BASED MARKETING

Abstract of Invention

5

A method for promoting the selection of an item to a predetermined type of consumer. The method includes the steps of determining representative activities of the predetermined type of consumer, determining representative uses of the item by the consumer during the representative activities, and creating demand for the item by the consumer based upon one or more of the representative uses of the item by the consumer during the representative activities.

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35 J&A Docket No.: 03628-0400

03628-0400

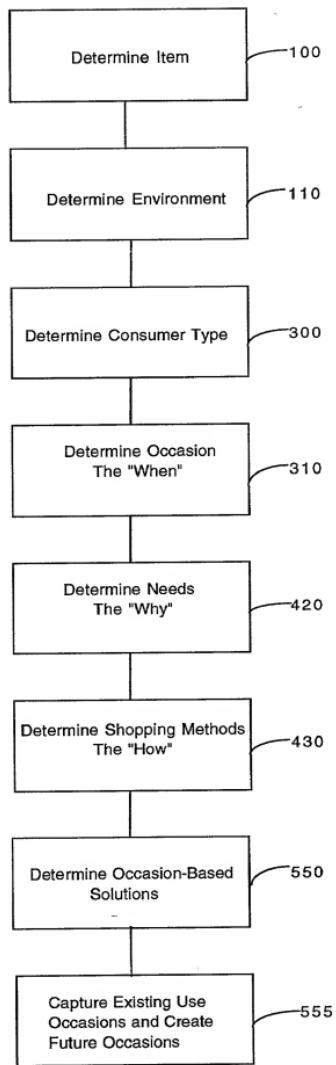


Fig. 1

Consumer Environments

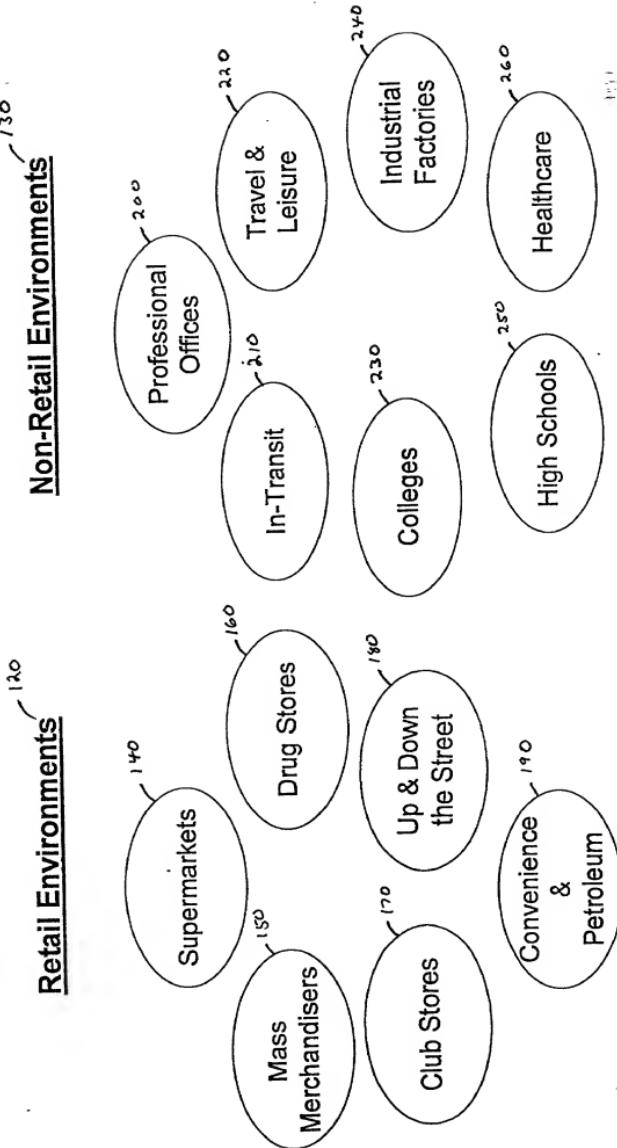


Fig. 2

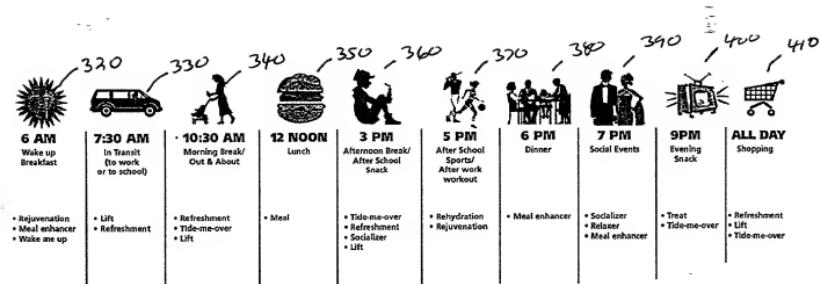


Fig. 3

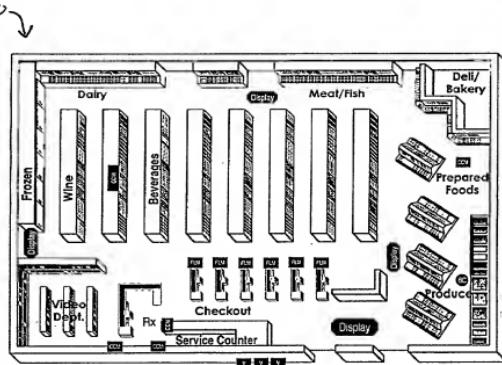


Fig. 4

09296420 = 094240

140 ~

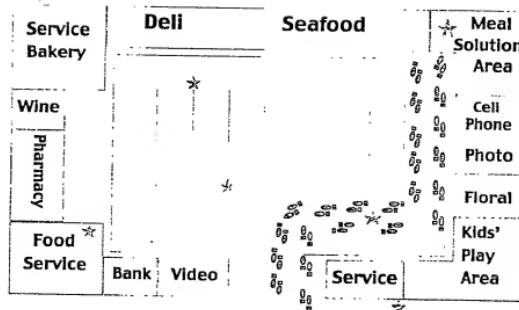


Fig. 5

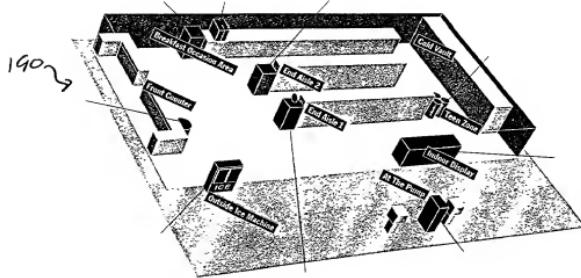


Fig. 6

DINNER TIME - QUICK MEAL SOLUTIONS

310	OCCASION - THE "WHEN"	Dinner
420	NEEDS - THE "WHY"	Meal Enhancer
430	SHOPPING METHODS - THE "HOW"	Quick Meal Solutions
550	OCCASION BASED SOLUTIONS	
580	→ BRAND	Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio
560		
590	→ PACKAGING	Single Serving Packages Fountain Cups Multipacks 2 Liter Bottles
560		
600	→ MERCHANDISING	Product in Express Lane Product in Prepared Foods Department Product Bundled with Pizza Product Bundled with Frozen Foods Small Display in Perimeter/Express Checkout/Produce Department
570		
610	→ MESSAGING	"Complete Your Dinner With Real Refreshment" "Cola Brand A & Chicken" "Cola Brand A & Deli Sandwiches" "Cola Brand A Lasagna"
570		

Fig. 7

0999420.024260

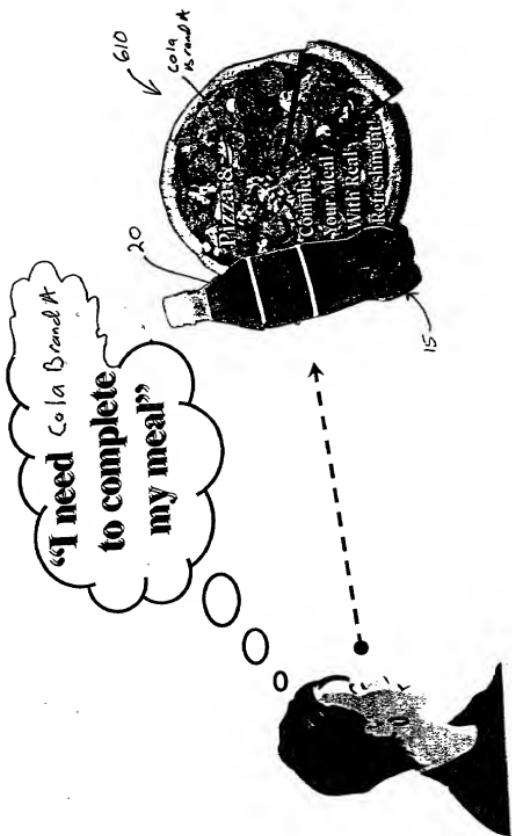


Fig. 8

SHOP REFRESHED

310 → OCCASION - THE "WHEN" 420 → NEEDS - THE "WHY" 430 → SHOPPING METHODS - THE "HOW" 550 → OCCASION BASED SOLUTIONS 580 → • BRANDS 590 → • PACKAGING 600 → • MERCHANDISING 610 → • MESSAGING	Shopping Treat/Refreshment/Tide-Me-Over Stock-Up Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio Single Serving Packages Fountain Cups Single Cans Cooler/Fountain at Entrance with or without greeter Shopping Cart Caddies Shopping baskets with Drink Holders Product at Checkout Outside Vending "Shop Refreshed" "Enjoy a Cold Cola Brand A While You Shop"

100-98-96-120-300-240-100

Fig. 9

SOCIAL EVENTS

310	OCCASION - THE "WHEN"	Social Events
420	NEEDS - THE "WHY"	Socializer/Relaxer/Meal Enhancer
430	SHOPPING METHODS - THE "HOW"	Stock-Up or Quick Mission
550	OCCASION BASED SOLUTIONS	
580	→ BRANDS	Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio
560		
590	→ PACKAGING	Multipacks 2 Liter Bottles
560		
600	→ MERCHANDISING	Movable/Modular Display Lobby Display End Cap Display Beverage Isle Product in Express Lane Product in Video Department Bakery Spot Display Small Display in Perimeter/Express Checkout/Produce Department
570		
610	→ MESSAGING	"Cola Brand A & Barbecuing" "Cola Brand A & Football" "Cola Brand A & Summer"
570		

Fig. 10

DRIVE REFRESHED

310 420 430 550 580 590 600 610	OCCASION - THE "WHEN" NEEDS - THE "WHY" SHOPPING METHODS - THE "HOW" OCCASION BASED SOLUTIONS • BRANDS • PACKAGING • MERCHANDISING • MESSAGING	In Transit Refreshment/Tide-Me-Over Gas & Go/Inside Pay Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio Single Serving Packagings Fountain Cups Single Cans Gas Island Vending Check-Out Counter Cooler Inside Store Coolers "Drive Refreshed With Cola Brand A"

Fig. 11

SNACK TIME

310	OCCASION - THE "WHEN"	Afternoon/After School Snacks
420	NEEDS - THE "WHY"	Refreshment/Tide-Me-Over/Energizer
430	SHOPPING METHODS - THE "HOW"	Quick Pick Up
550	OCCASION BASED SOLUTIONS	
580	• BRANDS	Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio
560		
590	• PACKAGING	Single Serving Packages Fountain Cups Single Cans
600	• MERCHANDISING	Snack Centers with Cooler and Snacks Teen Zone Barrels
570		
610	• MESSAGING	"Cola Brand A with Snacks" "Snacking Time is Cola Brand A Time"
570		

Fig. 12

INTERNET USAGE

310 ~	OCCASION - THE "WHEN"	Surfing the Net
420 ~	NEEDS - THE "WHY"	Refreshment/Energizer/Rejuvenation/ Meal Enhancer
430 ~	SHOPPING METHODS - THE "HOW"	Stock Up and others
530 ~	OCCASION BASED SOLUTIONS	
540 ~	→ BRANDS	Cola Brand A Diet Brand B Other Soft Drink Brands C, D Balance of Portfolio
560 ~	→ PACKAGING	Single Serving Packages Fountain Cups Single Cans Multipacks 2 Liter Bottles
600 ~	→ MERCHANDISING	Web pages/e-commerce
570 ~	→ MESSAGING	"Complete Your Dinner With Real Refreshment" "Surf with Cola Brand A"
570 ~		

Fig. 13